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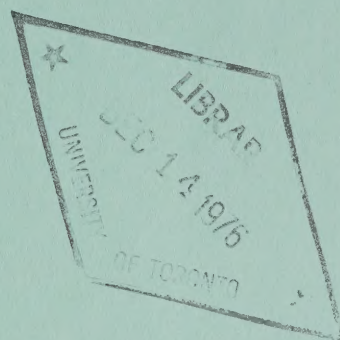
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Publications

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS

OPEN MEETING WITH THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

DECEMBER 20, 1974

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Appendix 'A' Introductory Statement by Dr. R. W. B. Jackson





ONTARIO COUNCIL ON UNIVERSITY AFFAIRS

MINUTES

4-0184 MEETING

OPEN MEETING WITH THE ONTARIO INSTITUTE  
FOR STUDIES IN EDUCATION

LOCATION

Queen's Park  
Toronto

DATE AND TIME

December 20, 1974  
5:00 p.m.

4-0185 ATTENDANCE

OCUA MEMBERS

J. S. Dupré

W. E. Bagnall

W. A. Goyan

J. J. Deutsch

D. G. Hill

J. D. Fisher

A. L. McCallion

P. D. Fleck

Ronald S. Ritchie

R. Gerstein

H. H. Walker

T. Giesbrecht

J. R. Yarnell

L. Good

OCUA STAFF

J. P. Venton  
Executive Secretary

N. E. Simmons  
Associate Secretary

MCU (Observer)

B. A. Wilson  
Assistant Deputy Minister

COU (Observer)

C. Isacacs





OISE DELEGATION

Dr. Robert W. B. Jackson  
Director

Dr. Robin H. Farquhar  
Assistant Director

Dr. Clive Beck  
Chairman, Institute Assembly  
Executive Committee

Dr. Stephen B. Lawton  
Assistant to the Coordinator of  
Graduate Studies

Mr. Robert Buckley  
Superintendent of Finance

Dr. Vernon Radv  
Chairman, OISE  
Board of Governors

Dr. George E. Flower  
Coordinator of Graduate Studies

Dr. Donald F. Burrill  
Chairman, Graduate Studies  
Standing Committee

Mrs. Isobel Roncari  
Member of Institute Assembly





4-0186 INTRODUCTORY REMARKS

The Director's introductory remarks are attached as Appendix 'A' to these Minutes. Subsequent discussion focused on the following:

4-0187 PROGRAMMES

The delegation reported a large demand for the Master of Education programme related in part to the regulation that a Supervisory Officer's Certificate required this degree. As well, in order to become a principal one normally must have completed or be in the process of obtaining an M. Ed. All elementary school teachers were required to have a first university degree and the demand from this sector indicated that many were interested in obtaining higher qualifications in order to secure a permanent career in teaching.

Demand for the M. Ed. on a part-time or full-time basis existed throughout the Province. As a result OISE was offering many off-campus courses. Fiscal stringency could be expected to affect these programmes in particular in that they were required to be well staffed and demanded extensive learning materials.

4-0188 FACULTY

Enrolment at OISE was reported to be increasing at a rate in excess of faculty additions. The BIU:FTE faculty ratio had grown from 23.4:1 in 1972-73 to 28.2:1 in 1974-75. The delegation agreed to forward to OCUA comparative data on average faculty salaries at OISE and the University of Toronto.

4-0189 ROLE AND INTER-INSTITUTIONAL RELATIONS

OISE's role was considered tripartite in nature: teaching, research and development, and dissemination being the 3 major components. OISE had a unique role in the Province in that, with the exception of the University of Ottawa, no university had any plans for mounting a doctoral programme in education. OISE was hence the primary source of qualified staff for Faculties of Education.





The delegation reported a great demand among the universities and other sectors for OISE's library materials. The Institute received many requests for assistance in the establishment of graduate programmes, cross-appointments and remote programmes on other campuses.

The delegation agreed to forward at a later date further information concerning OISE's remote locations, co-operative programmes with other universities, the extent of inter-institutional ties and the scope of programme offerings.

4-0190 RESEARCH

In 1974-75 OISE held \$592,000 in research funds from agencies other than Government. 25% of this total was received in the form of indirect cost allowance. OISE was currently evaluating the actual extent of overhead costs and expected to find that these would exceed the 25% currently being received. It was reported that the majority of Masters and Doctoral theses completed at OISE dealt with Canadian and Ontario issues. 90-95% of faculty research was conducted in and about Canada and Ontario. The delegation offered to forward a list of all internal and external research projects currently underway.

4-0191 STUDENT BODY

The delegation stressed the differences between OISE's students and those at other institutions. In particular it was pointed out that the average part-time student was 33 years of age and that 44% of part-time students were women.

4-0192 TUITION FEES

The delegation noted that an overwhelming majority of part-time students were employed on a full-time basis and were therefore limited in the number of courses they could take each year. Students were required to pay standard University of Toronto tuition fees, but the delegation felt that a significant proportion of part-time students,





because they were employed, could afford higher tuition. The delegation offered to calculate the level of fee that would be required to balance OISE's budget. It was felt that fees would need to double, without any decrease in enrolment, to achieve this objective.

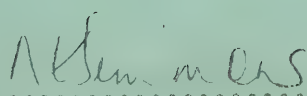
4-0193

OPERATING FINANCE

The delegation stressed that any further fiscal reductions would require changes in the functional basis of OISE. Furthermore, it was felt that elimination of any of the 3 functions would essentially change the Institute, lessen the quality of its service, and destroy its ability to attract high-calibre faculty.

The library was given as an example of the effects of current fiscal stringency. Acquisitions had been reduced by 20% (in actual dollars as compared with two years previously). It was felt that without question, this had damaged OISE's collection, especially research materials. As well it had been necessary to reduce library staff complements with negative effects on the level and periods of service.

In summary the delegation suggested that the university system was responsive to Government and that should explicit instructions be given to wind down operations the universities would respond just as they responded to the need to grow in the 1960's.

  
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N. E. Simmons  
Associate Secretary

  
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G. S. Dupré  
Chairman





THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATIONOCUA INTRODUCTORY STATEMENT, 1974

by R. W. B. Jackson, Director

Mr. Chairman, members of the Ontario Council on University Affairs:

May I first introduce the members of our delegation:

Dean Vernon S. Ready, Chairman of the Board of Governors  
 Dr. Clive Beck, Chairman of the Institute Assembly Executive Committee  
 Dr. Don Burrill, Chairman of the Graduate Studies Standing Committee  
 Mrs. Isobel Roncari, Graduate Student  
 Dr. Robin Farquhar, Assistant Director  
 Dr. George Flower, Coordinator of Graduate Studies  
 Mr. Robert J. Buckley, Superintendent of Finance  
 Dr. Steve Lawton, Graduate Studies Office

We appreciate the opportunity to meet with you and to discuss some of our achievements, problems, and concerns. In your invitation of October 21st, Mr. Chairman, you proposed that we prepare a simple submission designed to serve two purposes. The first of these would be to inform you of the general strengths, orientations, and problems of OISE, and accordingly we have in the first part of our Brief provided a background statement which will, we hope, enable you to understand our objectives, organization, and something of our accomplishments. Since we are a unique institution and somewhat complex in structure, presumably members of your Council may wish to direct questions to these matters. We will, of course, be pleased to provide further information, orally today, or later in written form, as you may direct.

The second purpose specified in your letter of October 21st was to provide OCUA with information on which you could base advice to the government on financial arrangements for the 1975-76 fiscal year, and accordingly the second part of our Brief addresses itself to our financial position and problems. I must point out in this connection, however, that we found it necessary to redraft completely this part of our submission in light of the unexpected statement of government policy and decision made by the Honourable James A. C. Auld to the Legislature on November 18th. You will recognize, I'm sure, that we must now consider what the financial position is, and all its implications for us, and cannot be concerned with

what it might or should be for fiscal 1975-76. Like all the other universities and colleges, we find these new circumstances trying and frustrating to a high degree: we are forced to react to a decision made unilaterally rather than to participate in a meaningful way in the development of a plan for the coming year. We have of course tried to react constructively, not just critically or negatively, in the second part of our Brief.

May I now refer briefly to the first part of our Brief. OISE is not only a large graduate school in education (formally affiliated for the time being through an agreement with the University of Toronto for this purpose), but also a large educational research and development Institute, charged with responsibility for conducting research and for disseminating the results of educational studies and assisting in their implementation in the school systems and other educational agencies of our province. These responsibilities are province-wide. However, since we do not have exclusive jurisdiction, we cooperate with other universities (particularly those with faculties of education), with school system and community college authorities and teachers, and with officials of the provincial ministries. During our brief period of operation (this is our tenth year) we have gained gratifying recognition of the extent and quality of our graduate programs and also of our research and development and dissemination programs, not only provincially and nationally but internationally as well.

Our instructional programs have always been a major focus of our efforts. We view our graduates as a leading source of change and improvement in education, both in Ontario and beyond its boundaries. Our graduate programs have far exceeded in size the expectations we held at the time OISE was established just over nine years ago, judging by the large number of specialized courses offered and students enrolled. As the figures given in our Brief show, both full-time and part-time enrolments in the regular session have increased nearly five-fold, and summer session enrolment has nearly tripled. In nine years we have graduated 186 doctorates and 3,470 master's students, and this year alone we have 2,118 students in the regular session and 1,310 in the summer session and anticipate we will graduate about 45 doctorates and 575 masters. Moreover, on the basis of assessments by others of their quality, and I refer in particular to the ACAP reports, our graduate programs rank high among graduate programs in education anywhere in the world.

Much of this expansion reflects the great unmet need for graduate programs in education, in Ontario and in the rest of Canada, that existed prior to our establishment and that was, in large measure, a major reason that the establishment of OISE was felt to be essential. But the steady increase in enrolment year by year and our inability to admit all who apply indicate that the needs are still not fully satisfied. In this connection, we



are uncomfortably aware of the large numbers of Ontario students who undertake their graduate education in the United States and in other countries, and of the establishment in Ontario itself of off-campus courses and complete programs by American universities. We have indeed made substantial progress, but much remains to be done by other universities as well as by OISE. In a field such as education we feel keenly that we should be able to provide adequate facilities for graduate work in Canadian institutions, with content specifically directed towards Canadian problems and solutions. Of course, we do recognize that in many respects scholarship is universal, and we acknowledge the very substantial assistance provided over the years by American and British universities. Obviously, much is gained when Canadians study in other countries, and citizens of other countries study here.

For Institute students as a whole, the vast majority are employed either in school systems or other educational institutions and agencies, mostly in Ontario. We make special efforts to meet their needs for continuing education by ensuring that the quality of course content and instruction is the same for full-time and part-time students. To this end we schedule most of our lectures after school hours and in the evenings during the week, and in some cases - such as in off-campus courses - on Saturdays as well. Our library is open for long hours every day, including Saturday and Sunday, up to 80 hours per week. Moreover, we believe that, for our students, formal courses leading to degrees are not the only, and sometimes not even the best, means of meeting the demands for continuing study. We offer certificate programs in both adult education and school management, and hold numerous workshops, seminars, conferences, and arrangements for private study that may extend from a few hours to several weeks. As a case in point, we cooperate with teachers and Ministry of Education officials in planning and conducting programs for professional development days for teachers throughout the province.

In short, our students are a special group, and the Institute makes special provision for them. They are, on the average, older and more mature persons with greater commitments and responsibilities to family and employer. We are gravely concerned about the level and extent of financial support available to them while they are with us, and request that consideration be given to greater than normal student financial support for them. Unfortunately, in recent years, despite the ravages of inflation, the total amount of financial assistance available and the amount per student have steadily diminished. This trend should be reversed, and in our opinion sharply so.

In concluding this part of my introductory comments, I wish to emphasize that our experiment in establishing an institution with three interwoven strands of graduate instruction, research, and development has been highly successful. Each of these functions supports and strengthens the



other two, and separately none could have attained the stature and achievements now evidenced at OISE. And our students gain immeasurably from the resulting association of theory and practice, particularly from the opportunity to be involved directly and meaningfully in research and development projects on topics of current concern in education.

Finally, I turn to the second section of our Brief, on finances. We can set aside for the moment the problem of capital financing, since our building is financed on a lease-purchase basis approved by the government seven years ago and owing to financial constraints we are in no position for the immediate future even to consider expansion and the construction of new facilities. Depending on the state of the economy, the extent of demands, and our resources, that particular bridge can be crossed in the late seventies or early eighties. Further, we need touch only briefly if at all on the direct financing of our research and development programs since, although severely battered, we have managed to survive the financial and related crises associated with the reduced level of their funding from the provincial government and other sources. I would merely note the fact, and indeed stress it, that no substantial financial relief is in sight from these sources - not even a modest amount sufficient to offset fully the inroads of inflation which have reduced these programs far below the levels indicated by their face value in unadjusted dollars. We have indeed cut back and adjusted our programs to these new levels of support, damaging as this has been to our overall thrust in all three functions. We have been slowed down very markedly in these functions, but not completely stopped; we cannot rely as heavily as we once could, of course, for direct and indirect support from these activities for our instructional programs. All of this does throw into stark relief, however, the major problem before us today, namely how can we hope to support our high quality graduate program from the revenues received, and in particular to be received for 1975-76, through the operating grants provided by the Ministry of Colleges and Universities.

Realizing four years ago that financial support for post-secondary education in general and for OISE in particular was being given a lower priority rating by the provincial government, we took two steps of major significance: first, we controlled expenditures through the exercise of economies and set aside reserves for revenue stabilization for the difficult years we saw looming before us; and, secondly, we introduced, at first informally and then formally, "rolling" five-year projections of revenues and expenditures to guide us in budget preparations and in policy decisions. These steps saved us from financial disaster, although we are in a financial crisis now owing to two major unforeseen events: the introduction of the "slip-year" method of calculating formula revenue for 1973-74, without any adjustment even on a system-wide basis during that year; and the savage and implacable blows of the spiralling costs of goods and services (now at levels of inflation



I do not remember encountering before during my entire lifetime). As a result, we have had to cut and slash expenditures systematically and unmercifully, through substantial reductions in services and in number of staff (by "silent" and often "not-so-silent" terminations), even to the extent of lopping off one major division of our administrative structure. Since our enrolment has increased each year and the increases in the BIU values have not kept pace with inflation, as you will no doubt have heard from every delegation, we have been forced to increase significantly the teaching and student advisement loads of our academic staff. With the increasing amounts of revenue being delayed in the cash flow because of the "slip-year" basis of financing, coupled with economies being effected in every aspect of our operations, this has meant "more scholars for the dollar", with a vengeance. We can't continue along these lines any longer without very seriously reducing the quality of our instructional programs even further, and indeed recent wage and salary settlements put into effect in other parts of the economy (particularly by the federal and provincial governments) may force salary increases at OISE higher than anticipated and therefore larger deficits in our financial plans as total expenditures are forced upwards to accommodate salary agreements.

Our Brief gives in considerable detail the present and probable future financial position for OISE, and also lists some of the major economies we have effected in our operations. We are doubly concerned now in that our reserve funds for revenue stabilization will have been completely exhausted in the coming year and the increases in the basic BIU value have not kept pace with the rate of inflation. Any further economies in operation will be impossible, as we see it, without major surgery which would cripple our efforts and definitely eliminate certain necessary functions and services. Staff reductions have been carried as far as we can go, and the salaries of all categories of our staff must be increased substantially simply to keep pace with inflation (and with our competitors) - to do otherwise would face us with the certain risk of losing many if not most of our best qualified and most experienced colleagues in all staff categories.

We are definitely at a crossroads. We need additional revenues to continue our operations at even the present strained level. Failing that, we must plan to reduce our activities, in number and extent and quality. Yet the needs are great, and continue to grow even greater. To fail to meet them would in our opinion be equivalent to betrayal of the people of Ontario, and the students in our schools and classrooms at all levels of the educational system would inevitably be the greatest losers of all. There are essential jobs which need to be done. We can do these jobs, as we have already demonstrated, but we need the tools to do them.

The biggest problem of all of course is the financial one. As for the



question of allocation of revenue to the different institutions in the province, and the alternatives the Ministry proposed for consideration, we do very strongly favour continuance of the present formula system based on enrolment. Moreover, we also recognize the need to continue (for the immediate future at least) some form of extra-formula grants in order that some of our newer and smaller institutions may survive, although we have not ourselves benefited from such grants. Continuing study of the system of allocating revenue is obviously essential, but we urge that the present formula system not be radically altered or abandoned: it does provide to a large degree an equitable distribution of revenue according to need; it also protects and helps preserve the autonomy of individual institutions which is so essential a feature of a strong and high quality university system for our province. But the basic problem remains the level of support provided by the province to the university system as a whole. We simply cannot continue under the circumstances which have prevailed during the past four years, for example, where increases in the basic revenue unit did not even match the inflation factor and as a consequence the university system was steadily eroded and weakened. Without substantially greater financial support, the future looks grim and bleak indeed: a steady deterioration of the university system and a lowering of the quality of higher education for all; and the denial of open access to the system for many of our qualified young people.

To return to the picture for OISE and to summarize, then, in the last few years our financial circumstances have required us to trim our budget drastically and overload our staff. We have not been able even to meet fully the critical increased costs of goods and services. More recently we have had to give up any hope of maintaining the basic level of all our programs and services, even with every economy measure we could devise, and hence we have been forced to eliminate significant components of our operation. Yet at the same time the legitimate demands and expectations for our programs and services have been increasing substantially. Thus, we find ourselves in an untenable predicament, the seriousness of which has not been fully recognized or acknowledged by the provincial government. Unless we get immediate financial relief from this predicament, the long-term survival of OISE's high quality programs and services as a unique and important element in Ontario's system of post-secondary education will be very much in doubt. To lower quality in hope of survival, or to maintain quality and perish, that is the question facing us today.

May I suggest, Mr. Chairman, that we now proceed on the basis of formal or informal discussion, as you may wish. We hope that we can answer all your questions fully today, but if not we hope you will permit us to submit supplementary information within a few days, either orally or in writing.